DOCUMENT RESUME

ED 083 404 CE 000 394

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TITLE A Guide to Success in Extension for New Colorado Extension Employees.
INSTITUTION Colorado State Univ., Ft. Collins. Cooperative Extension Service.
PUB DATE Dec 72
NOTE 40p.; For related documents, see CE 000 395 and CE 000 396

EDRS PRICE MF-$0.65 HC-$3.29
DESCRIPTORS County Officials; *Employees; *Extension Agents; Government Employees; *Guides; Instructional Materials; Manuals; *Orientation Materials
IDENTIFIERS *Colorado

ABSTRACT

The orientation guide of the Colorado Extension Service is to be used in conjunction with the Supervisor's Guide to provide a more systematic introduction to the work for new employees. It covers personal and family needs; office and organizational procedures; techniques in meeting the people; the Extension organization, position, job, duties, and roles; the program development process; and professional competence and improvement opportunities. Suggested checklist of subjects which should be discussed and understood accompany descriptions of objectives and priorities without setting forth strict rules or specific answers. Score cards for meetings and circular letters are included for evaluation of work. Seven recommended readings are listed. (MS)

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COOPERATIVE EXTENSION SERVICE
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U.S. DEPARTMENT OF HEALTH
EDUCATION & WELFARE
NATIONAL INSTITUTE OF
EDUCATION

# a guide to success in extension for new colorado extension employees

CE 000 394

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PLEASE NOTE

This Guide is presented to _____ to aid you in your becoming acquainted to your new position, location and Colorado Extension. Please feel free to use the check lists, make notes on any of the pages, remove or copy any parts.

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# A GUIDE TO SUCCESS IN EXTENSION

FOR

NEW COLORADO EXTENSION EMPLOYEES

COOPERATIVE EXTENSION SERVICE
COLORADO STATE UNIVERSITY
FORT COLLINS, COLORADO

DECEMBER 1972

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ORIENTATION TRAINING

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Extension Employment is open to all without regard to race, creed, color, sex or national origin.

FOREWORD

It is a pleasure to welcome you to the Colorado Cooperative Extension Service. It is our sincere desire that you be successful in our organization as much or even more than you may want to be a success.

This Guide and the companion Guide your supervisor has in his possession have been prepared especially to help you become a success in your new position and location. These guides are designed to reflect the realism that each new employee has a different background, thus needing different kinds of helps. Your supervisor is responsible for providing for those helps but as a professional Extension employee it is your responsibility to communicate your specific needs to this person so that the proper response can be made. Naturally, you in return will need to be receptive to your supervisor's and/or his staff's efforts to help.

Colorado is a state with a variety of problems, situations and climates. To function in a state of such variety we must have flexibility, give and take, within our own Extension organization. These flexibilities that allow us to function effectively are the same ones that make learning to be an Extension educator difficult to communicate to new employees.

We are pleased you chose the Colroado Cooperative Extension Service as your career. Extension has been and is a rewarding career for hundreds of professionals. And we, in Colorado, are determined to help you make it a rewarding career for you as well as the public you serve.

Sincerely,

L H Watts

Lowell H. Watts
Director,
Cooperative Extension Service

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# A GUIDE TO SUCCESS IN EXTENSION

## Colorado Extension Employees' Orientation Guide

## INTRODUCTION

Orientation, says Webster, is "familiarization with and adaptation to a situation or environment" also "interpretation of the environment as to time, space, objects and persons". This definition seems to encompass the overall purpose of Extension orientation.

The person responsible for your orientation is your supervisor. Supervisors have been supplied with a copy of the "Supervisors Guide for the Orientation of Extension Employees" to aid them in a more systematic orientation of their staff members. The above-named publication is designed to help supervisors be more aware of possible questions the new staff member may have and to be more alert to "the teachable moment," that is, the right time and place for your learning the many facets of how to work in Extension.

Even with the "Supervisors Guide", supervisors though having a desire to help may overlook orientation needs of new staff for a variety of reasons. Supervisors are busy people, most are not mind readers, and some may lack an interest in your program field. You could possibly find yourself working with a supervisor new to the location with a lack of knowledge to ask or answer some of your questions.

Regardless of what kind of situation you find yourself in and regardless of the supervisor being responsible for your orientation, communication in your orientation is a two-way street. In order for the supervisor and his staff to respond to your needs they must have some way of knowing what your needs are. This becomes rather difficult if you, as a new staff member, unfamiliar with this new position, location and/or organization can't identify what your needs are either. This leads us to the purpose of this guide.

"A Guide to Success in Extension" is not an answer book, it is a "raiser of questions" book and a guide to "where you might find the answers" book. In other words, the purpose of this guide and the companion guide your supervisor has are to aid the parties involved in the orientation process; you, your supervisor, his staff, other Extension personnel and clientele to communicate in an effort to get you off on the right foot.

### The Orientation Process

For clarity the contents of this guide have been arranged into an "orientation process" consisting of seven phases. These phases are presented in the next pages in a chronological order for clarity purposes only. It should be realized that the best learning happens during the periods of time when the knowledge is usable. In other words, "the teachable moment."

The following objectives will be expanded in the sections of the guide that follows.

Phase I - Objective: To satisfy those needs which affect you and your family personally in respect to the new situation and environment.

Phase II- Objective: To become familiar with office and organizational procedures.

Phase III-Objective: To begin the process of meeting the people.

Phase IV -Objective: To become familiar with the Extension organization.

Phase V - Objective: To develop an understanding of your new position and the identification of the job responsibilities, duties and roles that best suit the Extension organization, you, the position and the job.

Phase VI- Objective: To gain an understanding of the Extension program development process.

Phase VII-Objective: To become aware of the need for professional competence and continuous professional improvement opportunities.

Immediate Responsibilities

The first few days on the job may be quite confusing. Extension and Department staffs get very actively involved at numerous times throughout the year with 4-H activities, meetings, budgets, phone calls, office visits, student counseling, etc. Many new staff members report that they arrived on the job one day, found themselves at 4-H camp the next, and haven't slowed down since.

In order to get you through the first few days on the job when it seems nobody has much time to explain what is going on, the supervisor may give you a list of specific tasks in conjunction with the event or events at hand. These "immediate responsibility" assignments you may note, because of their "involvement into the job" nature, may cross into any one or more than one of the phases outlined. Though these events may be confusing, none the less, they do provide an experience or "teachable moment" for you to learn about things Extension people do and how they perform on the job.

The assignments your supervisor gives you may come orally or in written form. If the supervisor doesn't provide you with assignments in written form, you may want to arrange these in an outline using the form on the following page. This procedure will help you remember what you are to do and provide you with a record of what you have completed so that you may discuss them with your supervisor or fellow staff members at a later date.

You probably will have questions about the event or assignments. By all means ask them. Remember your supervisor and fellow staff members cannot read your mind.

Date _____

Immediate Responsibility Outline

(Duplicate additional copies as needed)

Event or program _____

_____

_____

Assignments for new employee _____

_____

_____

Assigned by _____

| Time and Dates | | Assignment Details |
|---|---|---|
| Planned | Completed | |
| | | |

# THE ORIENTATION PROCESS

Phase I - To satisfy those needs which affect you and your family personally in respect to the new situation and environment.

Your supervisor and fellow staff members are a part of your "job family". As such, it seems reasonable to expect help from them if you need it to get yourself and your family settled into a normal life pattern in your new community. In most cases your fellow staff members have lived in the area for some time. They have become familiar with the people, services, facilities, and who to see to get the help we need to live comfortably.

Don't be afraid to let your supervisor know of any problems you are having that he or the staff may be able to aid you with. It is pretty well known that these personal needs must be taken care of before a new employee can begin thinking about his work with much effectiveness.

## Suggested Aids

A check list is provided on the following page which might be helpful to you in getting settled. You undoubtedly will have items to add.

## PERSONAL NEEDS CHECK LIST

_____ Communication of arrival time and place with supervisor

_____ Housing available and names of realtors

_____ Temporary housing if needed

_____ Transportation (if needed)

_____ Utilities

_____ Telephone

_____ Mail

_____ Newspaper

_____ Assistance needed for "moving in"

_____ Churches

_____ Schools

_____ Stores and public facilities

_____ Points of interest

_____ Child care

_____ Where and when to report for work

_____ Arrangements for family meeting of work associates

_____ TV hookup (cable)

_____ Who to meet for financial assistance should you need it

_____ Other (your own list)

## THE ORIENTATION PROCESS

Phase II - Objective: to become familiar with office and organizational procedures.

Office and/or organizational procedures are unique to every office and organization. All employees must eventually learn the "system". Therefore, your rapid attention to these "given" procedures will speed up your adjustment to the job, avoid embarrassment, and make you feel more comfortable in your new job environment. If this is your first position in a profession, you are new to Extension, or this is your first position with an office team, you may have to ask a lot more questions than if you have experience in one or more of the above.

### Suggested Aids

The following check list is provided for you so that you may systematically become oriented to the office and organization procedures. The check list should give you a starting point for asking questions that may have been missed by the supervisor or his staff.

ORGANIZATIONAL AND OFFICE PROCEDURES

CHECK LIST

(This list is general in nature and will require greater specificity to fit a specific position; some items may not apply.)

Date discussed or completed

_____ 1. Working hours

_____ 2. Parking arrangements

_____ 3. Keys for and general information about building, office, restrooms, storerooms, janitorial services, etc.

_____ 4. Coffee and refreshment arrangements

_____ 5. Telephone procedures, placing long distance calls, Denver line, credit cards, etc.

_____ 6. Handling incoming and outgoing mail (times, procedures, who, where).

_____ 7. Special funds (coffee, flower, courtesy, petty cash, etc.)

_____ 8. Staff meetings (dates, times, location, responsibilities).

_____ 9. Penalty mail requirements and responsibilities.

_____ 10. Secretarial responsibilities and procedures (preparing letters, filing, work priorities, etc.)

_____ 11. Inter-office communication (routing mail, keeping supervisor informed, keeping office informed about schedules and location, teamwork).

_____ 12. Office budget and travel allotments.

_____ 13. Salary procedures (salary increases, performance evaluation, job counseling, grading system, professional improvement opportunities).

_____ 14. Special procedures.

_____ Moving expenses (if unclear)

_____ Probationary period

_____ Requests for leave (official, annual, sick)

_____ Tenure policy

_____ Travel approval

_____ Monthly itinerary

_____ CEMIS Activity Reports

_____ Plan of Work

_____ Narrative reports

_____ Field reports (state staff)

_____ Specialist requests

_____ Expense account

_____ Ordering audiovisual aid equipment and other materials and equipment

_____ Obtaining and using state cars (state staff only)

_____15. Purchasing supplies and materials

_____16. Office privileges and/or policy

_____ Beauty shop, dentist, doctor, barber, etc.

_____ Personal errands

_____ Use of sick leave and annual leave

_____ Compensatory time (as a result of night work or weekend work)

_____ Outside personal activities (moonlighting, public behavior, community involvement)

_____ Official holidays

_____ Faculty club

_____17. Filing system

_____ Explanation of office system

_____ Suggestions and help in developing a personal system

_____ Review of Filing Manual

_____ "Spring housecleaning" if in order

_____18. Explanation and use of available office and audiovisual equipment.

_____19. Office, building, grounds and area tour

_____20. Mailing lists

_____21. Other (identify)

## THE ORIENTATION PROCESS

Phase III - Objective: to begin the process of meeting the people.

Your success in this new job may well depend upon the speed with which you get acquainted with the people key to your job. You will find two steps necessary.

1. Identification of "key people" as determined by your job responsibilities and the situation

2. A systematic attempt by you to meet the people identified as "key".

Your supervisor and fellow staff members can be of extreme help in getting you started with this process. They can:

1. Provide you with prepared lists of people for you to meet.

2. Help you establish priorities (meeting everyone will require a great deal of time).

3. Go with and introduce you to clientele and key people (at least in the beginning).

4. Review your progress. Continued communication with staff is very important.

Meeting people is a continuous and for the most part natural process throughout the orientation period. Those people you meet, of course, will not all be limited to prepared lists. Therefore, it could be helpful to you to keep a record of people you've met, especially if you have difficulty in remembering names.

### Suggested Aids

The following page contains two outlines that identify categories of people that your supervisor and staff may feel are key for you to meet. These are only guides to aid you, your supervisor, and your fellow staff members in developing check sheets for your own use. The outlines are separated for use by campus personnel and county or area personnel, although there surely is overlap for both.

## An Outline for Getting Acquainted With People

The following outline is intended as a guide for the development of a check sheet containing the names of people to be met by you. The resulting listings of people should include the name, why important to Extension, and a space to indicate the date they are met.

Area or County

1. Elected officials (Legislators, Commissioners, Mayors, City Councilmen, Assessors, Sheriffs, School Board Members, etc.).

2. Advisory Committee Members (CSU Council Members, Resource Development Groups, Commodity Organizations, Youth Council Representatives, Extension Homemakers Organization, etc.).

3. Chamber of Commerce (Officers and Manager).

4. Government Agency Representatives.

5. CSU and Extension Personnel (Specialists, Program Leaders, Administrative Officials, Other Faculty).

6. Church Groups, Service Clubs and Community Action Groups (Officers and Leaders).

7. Extension Program Officers and/or Leaders not included in above.

8. Field staff (contact agent, area or county specialists, Agent Association officers, Sub-district officers, etc.).

9. Other

Campus

1. Campus Extension Personnel (Director, Assistant Directors, Program Leaders, District Extension Directors, Specialists).

2. CSU Faculty (Deans, Department Heads, Key Faculty).

3. Key physical plant staff (motor pool, etc.).

4. Advisory committee members.

5. Other.

# THE ORIENTATION PROCESS

Phase IV - Objective: To become familiar with the Extension Organization.

You cannot be expected to understand or to know all that is presented and discussed in this phase very fast. It is expected however that you will review and discuss the items presented in the check lists on the next two pages. This will take a great deal of time in reading and discussion; therefore, it is something you and your supervisor should plan for.

Review of the items on the check list should prompt you to ask many questions about the organization and your supervisor's philosophies in connection with the various facets of Extension. Don't hold back and don't leave questions unanswered.

## The Check List

Don't rush to get this check list filled out. Be sure you have completed the suggested reading and discussion to your satisfaction and best understanding before checking.

ORGANIZATIONAL INFORMATION

CHECK LIST

Date discussed or completed

_____ 1. Review the materials you received upon application if you need to.

_____ 2. Review the information covered at the time of contract signing. Material and information included faculty appointment, health benefits, life insurance, ID cards (faculty, federal, civil defense) Workmen's Compensation, W-4 forms, retirement program, salary, leave (annual, sick, with pay, special study, sabbatical, official) loyalty oath, and patent agreement.

_____ 3. Materials to be reviewed and subsequently selectively read. (All are available in the office or planning unit)

_____ Extension Handbook

_____ Faculty Manual

_____ CSU Resource Guide

_____ CEMIS Handbook

_____ Popular Publications for Colorado Residents and Annual Inventory of Available USDA Popular Publications

_____ EFNEP Handbook

_____ 4-H Handbook

_____ Civil Defense Handbook

_____ Land Use Planning Handbook

_____ Service in Action Handbook

_____ People and A Spirit

_____ EEO and Civil Rights Affirmative Action plans

_____ Consumer Protection Guide Book

_____ Other

_____4. *Extension Organization

_____ Administrative structure and individual responsibilities

_____ Organization of state specialists (program areas, department heads, etc.)

_____ Contact agent groups (including Youth Development Committees)

_____ Sub-District Organization (committees and officers)

_____ Agents Associations

_____5. *Campus Procedures and Organization (primarily for state staff)

_____ Publication preparation procedures

_____ Publication distribution procedures, policies, and costs

_____ Services provided by Educational Media (tour may be helpful)

_____ Information Service

_____ Specialists organization

_____6. Review of Performance Counseling and Appraisal Guide

_____7. Resource materials common to the particular position or job responsibility (list and assist in locating)

_____8. Other

*Through consultation following or in conjunction with the reading in Item 3.

## THE ORIENTATION PROCESS

Phase V - Objective: to develop an understanding of your new position and the identification of the job responsibilities, duties and roles that best suit the Extension organization, you and the job.

In general, each phase of this Guide points toward helping you understand why you were hired. The purpose of this phase is to deal directly with the position, job, responsibilities, duties and roles. You will recognize many of the activities related in this phase as things you did the first few days on the job especially if you arrived during a peak activity period.

Suggested Activities

1. Read - Current planning unit plan of work
   - Position description for your position
   - Job description of your predecessor
   - Position and job descriptions of others in your planning unit
   - Past narrative reports and success stories.

2. Prepare an activities calendar for the coming year (be sure to discuss with other members of the planning unit).

3. Association with a more experienced staff member.

   Plan some time with a more experienced staff member. Observe how they perform in different situations. This activity may call for making arrangements with somebody in another planning unit. If you feel this kind of association would help, consult with your supervisor on how to make these arrangements.

4. After reviewing your position description, and discussing your responsibilities with your supervisor and others, prepare a job description using the following outline:

   a. Name, title, position, location and date

   b. List major program areas of responsibility

   c. List major duties and/or activities expected in the major program areas

   d. List areas of joint responsibility with other staff members

   e. List duties and/or activities expected in joint endeavors.

## JOB RESPONSIBILITIES
## CHECK LIST

Date discussed or completed

1. Reading

   _____ Current planning unit plan of work

   _____ The new employees position description

   _____ Job description of predecessor

   _____ Position and job descriptions of others in the planning unit

   _____ Last year's narrative reports and success stories

2. _____ Prepared activities calendar

3. Prepared job description containing

   _____ Major program area responsibility

   _____ List of major duties and/or activities expected in the major program area (include responsibilities to program planning and advisory groups; organizations and commodity groups relevant to the position: i.e. Extension Homemakers and Farm organizations; and mass media)

   _____ Joint responsibilities with other staff members

   _____ List of duties and/or activities expected in joint endeavors.

4. Discussed:

   _____ Professional associations

   _____ Professional image (appearance, behavior, attitude)

   _____ Office relations (loyalty)

   _____ Other (identify)

Some other activities that may help you identify your duties and roles.

1. Problem oriented visits with other professionals in the Extension organization.

   New field staff may feel a need to visit with key individuals on the campus staff to learn more about their particular program area or the new member to the state staff may feel a need to find out about what is happening in the field.

   a. How to arrange.

      1) Determine with your supervisor the people and places to be visited.

      2) Correspond with or phone the people to be visited, set the date, place, time, and outline objectives for the visit. For instance, a campus visit for field staff might include development of a program with a program leader, District Extension Director, specialists or other campus personnel. A field visit for state staff might involve other specialists, program leaders, their supervisors, county or area planning unit personnel or other persons in planning and conducting a program from beginning to end in the field. This kind of planning could call for more than one trip.

2. A group of new employees and/or established employees with common concerns might consider joining together for a trip to the campus/field. If you do, consult with your supervisor about the possibility. It would be very important that a function like this be planned well and have clearly defined learning objectives. It is also important that supervisors are informed/involved throughout the planning. Some possible purposes for a trip like this could be:

   a. To meet the correspondents (not a valid reason alone for the trip, but does happen).

   b. To gain in-depth orientation to state/field programming and philosophies.

   c. To participate in practical application of program planning, including the conducting and evaluation processes of program planning.

   d. To plan and participate in in-depth planned training programs based on needs, wants, and planned objectives of new workers themselves.

   e. An opportunity for the supervisor and new employee to train together.

Check List, Additional Reading and Scorecards

The check list on the following page may be helpful to keep a record of what you have done. An outline for an activities calendar is provided on page 18. The additional reading on pages 19 - 24 could prove helpful also in identifying your job duties and roles. The meeting and circular letter score cards on pages 25-28 may be helpful in getting through your first meetings and in putting together your first newsletters.

# ACTIVITIES CALENDAR

| Dates and Times | Events & Activities | Location |
|---|---|---|

## DUTIES OF SUBJECT-MATTER SPECIALISTS *

In backing up the work of agents in counties and areas the subject-matter specialist group, is concerned with the improvement of teaching. Specialists view the whole program and relate subject matter to all the phases of program making and execution. Five broad groups of functions are performed by subject-matter specialists, namely: planning functions, training functions, direct teaching, field studies to increase the effectiveness of the work in their respective subject-matter lines, and preparation of teaching materials.

In order that the work of specialists may be coordinated to help solve problems involving one or more subject-matter fields, someone may serve as leader of specialists. Such a person bears the same relation to the specialists as supervisors of other groups in the service bear to the group they supervise. When there is more than one specialist in a subject-matter department, the head of the department or one of the specialists may be designated as program leader. His duties are largely planning and coordinating.

The following list of specific duties of specialists was prepared in part by summer-session extension classes:

1. Keeping state and county extension workers up-to-date with regard to the findings of science and their application to the solution of farm and home problems.

2. Serving as a bridge between subject-matter research departments and field extension workers; interpreting the results of research in terms of desirable farm, home and community programs.

3. Assembling and analyzing facts, clarifying problems in the subject-matter field, studying the status of his enterprise throughout the state and the nation.

4. Helping county and area personnel to develop sound county, area and community programs in which subject matter is correlated to best serve the interests of the farm and home as a family unit.

5. Assisting agents, county and area specialists in the effective use of teaching methods peculiarly adapted to the subject matter involved.

6. Backing up the county and area programs with suitable state-wide publicity, popular bulletins, form letters, motion pictures, film strips, slides, exhibit materials, and other teaching aids.

7. Making studies to determine successful and unsuccessful methods of organizing and conducting extension teaching in the particular subject-matter field.

8. Outlining measuring devices and procedures applicable to the subject-matter problems being attacked and assisting agents and area specialists in their use.

9. Handling direct teaching of rural people within the county or area in such a manner as to strengthen the position of the county or area staff member and enable him better to meet subject-matter problems arising after the specialist's departure.

## DUTIES OF COUNTY EXTENSION STAFF*

The county and area extension staff is by far the largest and the most important group in the Cooperative Extension Service. As the official representatives of the state land-grant institution and the U.S. Department of Agriculture, living in the county or area in daily contact with men, women, boys, and girls in actual life situations, the county or area extension personnel are in a strategic position to study the problems and serve the needs and interests of the people of the county or area. The duties of the county or area extension staff are legion, and he or she must be constantly alert to the social and economic changes that vitally affect the lives of the people. As extension is a voluntary form of education, the success of the extension professional is largely determined by the degree of confidence that people come to have in the local representative of the Extension Service.

The various kinds of county or area extension professionals perform similar functions. The following statement of duties outlined in part by extension classes are suggestive of the type of training that needs emphasis. It is a composite statement for all types of county staff members.

1. Represents the state land-grant institution and the United States Department of Agriculture in the county in carrying on an educational program to improve living.

2. Studies the county or area, its people, and its agriculture, family life and community ascertain its problems and possibilities.

3. Develops or aids in maintaining the necessary organization of people to help determine and carry out the county or area extension program.

4. Develops with the people of the county or area a long-time and current agricultural family life and community educational program based on the major problems and needs of individuals--adult and youth--and families.

5. Develops leadership.

6. Assists local organizations with their educational programs when their objectives coincide with the objectives of the county or area extension program.

7. Promotes friendly relationships and the coordination of activities of all agricultural and community life groups within the county or area.

8. Maintains a public office where all people may call, telephone, or write for information on all problems relating to agriculture, family life and community development.

9. Keeps informed regarding social and economic changes affecting the farms and homes of the county or area and keeps up-to-date professionally through attendance at conferences, reading, participation in in-service training courses, and otherwise.

10. Develops interest and cooperation of various organizations and individuals in the solution of farm, home, and community problems.

11. Assists local leaders by supplying supplementary material, visiting farms and homes, providing helpful literature.

12. Arranges for help of specialists and other resource persons.

13. Provides information to individuals and groups other than those regularly organized.

14. Helps evaluate work done by obtaining and analyzing records and preparing statistical and narrative reports for county, area, state, and federal use.

15. Encourages the interest and cooperation of various organizations and of people in the development of boys and girls through club work.

16. Assists people in the communities in the organization of local 4-H Clubs, in the selection and training of local leaders, and in the development of programs.

## SPECIALIZATION AMONG COUNTY AND AREA PROFESSIONALS*

The composite statement above may be slightly misleading, for few Extension professionals, if any, would ever be expected to do all these things. In fact, the trend seems to be toward specialization. As more personnel are available in each county or area the work can be divided along subject-matter lines. Furthermore, with the increase in different clientele there is more specialization on farms and in communities. Some large commercial farmers have been heard to say, "I can't afford to fuss with chickens or a home garden". This may be sound farm management for that man, but it may overlook the best interests of the family and children. Specialization has led some counties to cooperate in the employemnt of one man for poultry, floriculture, spray service, or individual farm management. Agricultural engineers are being employed on an area basis to help with mechanization of farms. Areas of concern also affect the total community requiring specialization in working with people in community problems as well as specialized facets of family life.

*Adapted from: Kelsey, L.D. and C.C. Hearne, Cooperative Extension Work, Ithaca, New York. Comstock Publishing Associates, 1963.

## PROBLEM SOLVING FUNCTIONS OF THE EXTENSION PROFESSIONAL

There are three major roles that professionals in the Extension Service perform: (1) As a learning specialist or instructor, (2) as administrator of training and development of staff clientele, and programs, and (3) as a contributor to organizational and clientele problem solving. Each of these three roles requires different skills and abilities, and the extension professional should be professionally prepared for all three roles.

The extension professional as a learning specialist position brings with it a need for personnel skilled in the ability to use learning theory and methods to meet training needs. The extension professional as an administrator may not have the time, inclination, or experience to be an active educator or learning theorist. Extension personnel as administrators may find themselves involved in utilizing skills of administration on such tasks as recruiting, coordinating, selecting and developing his staff team, and planning programs among other administrative duties.

The extension professional as a consultant to clientele and management is stressed as the most important role. The major need for this type of role is for training to be recognized, and used, as a valuable tool for management problem solving. "Effective training is helping people 'learn how to learn' from every aspect of out life (p.5)."

The problem solving functions of the extension professional are based on his knowledge and skills: (1) The professional helps clientele examine organizational problems, such as a workshop for problem-identification in regards to the relations between the organization and its membership. (2) The professional helps clientele examine the contribution of training to these problems such as exploring with clientele how training in social action and communications might lead to problem solving. (3) The professional helps examine the long-range and short-range objectives of the training such as helping the clientele in refining objectives and setting goals. (4) He explores, with clientele alternatives to training-problem solving approaches. (5) He develops with the clientele, training plans based on the objectives, and developed with the aid of a steering committee rather than submitting an individually developed plan for approval. (6) The extension professional explores appropriate resources to implement the plan. (7) He provides consultation for the client on evaluation and review of the program. Evaluation must be in terms of problem solving and based on the current status of the problem not whether or not the clientele liked the program. (8) The professional explores with the client the follow-up steps necessary to reinforce problem solution. He encourages the client for example, to look at the

implications of the steps taken, and to assess the program at the present in terms of future action.

A continuum of consulting roles an extension professional will have in his helping relationahip are: Position (1): He gives expert advice to the client. This he would do relating to the role of an expert in his field. Position (2): He persuades the client as to a proper approach. This may be a corrective active when based on his knowledge and experience, he believes the client is headed the wrong way. Position (3): He provides alternatives to the client. In this role, he is helping the client by providing more than one route to take. The extension professional is not an implementor but is more of a facilitator in identifying alternatives to the client for confronting the learning aspect of the problem. Position (4): He assists in the problem solving process. He doesn't get involved in content but acts as a consultant in helping the client maintain the quality of its problem solving. Position (5): He serves as a catalyst for the client's problem solving. In this position, the extension professional may only ask questions for the client to take into account as he strives to find a direction for action.

_____
Type of Meeting

## MEETING SCORE CARD

### Planning

Circle Correct Answer

Yes No 1. Was purpose for the meeting clearly understood by participants?

Yes No 2. Were participants involved in planning the meeting?

Yes No 3. Was agenda written out in detail prior to the meeting?

Yes No 4. Did participants receive the agenda before the meeting time?

Yes No 5. Was the meeting place selected suitable--airy, light and comfortable?

How could planning for this meeting have been improved?

_____

_____

_____

_____

_____

### Meeting

Circle Correct Answer

Yes No 1. Did the meeting start on time?

Yes No 2. Did group members know each other or were they introduced?

Yes No 3. Was the purpose of the meeting clearly explained at the beginning of the meeting?

Yes No 4. Were participants involved in conducting the meeting?

---

Prepared by Melvin L. Eckard, In-Service Training Officer
Colorado State University, Extension Service May, 1965 E&T1

Circle Correct Answer

Yes No 5. Were participants given a break with an opportunity for refreshments?

Yes No 6. Were all participants given an opportunity to voice an opinion?

Yes No 7. Did speakers use audio-visual aids?

Yes No 8. Were participants given written materials to take home?

Yes No 9. Did participants seem interested in the meeting topic?

Yes No 10. Did any unplanned for difficulties develop?

Yes No 11. Were definite decisions made by the group in regard to needed follow-up, committees named, dates set or changes in practices that needed to be made.

Yes No 12. Did the meeting close on time?

Could this meeting have been improved?

_____

_____

_____

_____

Evaluation and Follow-up

Circle Correct Answer

Yes No 1. Was the effectiveness of the meeting evaluated by the participants?

Yes No 2. Did those responsible for planning the meeting evaluate it?

Yes No 3. Was a public report of the meeting made to the press and radio?

Yes No 4. Is there evidence that changes were made by participants as a result of the meeting?

Yes No 5. In your opinion did this meeting accomplish its purpose?

Page 3

How could the evaluation and follow-up from this meeting have been improved?

Circular Letter Title

## CIRCULAR LETTER SCORE CARD

| ITEM | GOOD | FAIR | POOR |
|---|---|---|---|
| Letter looks attractive, interesting and easy to read . . . . . | | | |
| Gets attention through unusual or otherwise interesting approach: | | | |
| Caption or salutation appropriate and effective . . . . . | | | |
| Cartoon or other appropriate illustration . . | | | |
| Opening sentence strong . . . . . | | | |
| Letter seems important; tells people something they want to know. (Develops interest) | | | |
| Has "you" and "your problem" approach . . . . | | | |
| Arouses curiosity at outset . . . . . | | | |
| Timely, deals with an immediate problem . . . | | | |
| Emphasizes importance of problem through reference to economic losses or other annoyance . . . . . | | | |
| Letter well planned; interest of reader held throughout by good continuity: | | | |
| Adheres to definite purpose (one idea) . . . | | | |
| Simple sentences and short paragraphs make reading easy . . . . . | | | |
| Complete and concise . . . . . | | | |
| Clear and easy to understand and remember . . | | | |
| Technical words and phrases avoided . . . . . | | | |
| If long, broken with interesting subheads . . | | | |
| News-story style followed . . . . . | | | |
| Letter makes reader aware of problem and eager for practical remedy suggested . . . . . | | | |
| Necessary facts well presented so that reader may decide wisely "Reason why" used effectively . . . . . | | | |
| Suggestion used effectively . . . . . | | | |

## THE ORIENTATION PROCESS

Phase VI - Objective: to gain an understanding of the Extension program development process.

This phase is intended to provide a guide for you to develop an understanding of the fundamental program planning process.

The following ten organizational principles have been operative since Extension began 50 years ago. They provided for changes which have taken place in adaption to changing conditions, but the principles within which Extension operates have remained the same.

1. Extension is educational in program content and methodology, not regulatory or financial; thus, it is administratively attached directly to the public university system and is a major part of it, rather than being attached to Federal or State government directly.

2. Extension is informal, noncredit education conducted primarily beyond the formal classroom, and for all ages. A variety of methods are used, extensive and intensive, with much emphasis on personal contact during the initiating stages of development with particular audiences.

3. Extension was established throughout the country close to the people, with local offices which are semi-autonomous units based on organization and planning with the people.

4. Broadly interpreted Extension functions to provide objective presentation and analysis of factual information for decision making by the people themselves; typically research based with free flow of communication between research, extension, and resident-teaching functions of the State university system, and also with the resources of the United States Department of Agriculture and other agencies, public and private.

5. Extension is people problem-centered and situation based. Extension education starts with helping people to identify and understand their needs and problems clearly and to work in solving them as they are in relation to their situation.

6. Extension is as broad as the economic, family living and community development problems of the people; including, but also concerned far beyond, agricultural production technology.

7. Extension is strictly a professional function manned by college trained personnel specifically qualified for their positions.

8. The human resource development of people, resulting from the processes of education involving the people, is considered an important result along with the results attained from the application of technological information.

9. Extension is cooperative, but not necessarily equal sharing of financial support between Federal, State and County or local levels. (In Colorado for 1970-71--Federal 33%, State 41%, County 23%, other 3%.)

10. Extension is cooperative, but not necessarily equal sharing of program development between Federal, State and County or local levels. (The locus of program control rests with local groups.)

There are several confusing areas related to program development that you may want to watch for.

1. Beware of confusion between such terms as goals, objectives, purposes, aims, etc. According to Webster they mean approximately the same thing. Additional confusion seems to develop when they are combined with such terms as: educational, short-range, long-range, teachers, learners, organizational, etc. In reality, whatever terminology makes sense to you should be used by you.

2. More clarity will result if the "Program Planning Process" is viewed as helping local people to make existing program activities more significant in view of local problems and the development of new activities that will assist in solving other local problems.

3. CEMIS (Colorado Extension Management Information System) was developed as a <u>reporting system</u> designed to provide all Extension staff with facts for management decisions. It <u>was not</u> intended as a program planning system.

4. Program accomplishments are greater when those concerned participate in the analysis of situations, identification of problems, setting of priorities, planning (decision making), action, evaluation and reporting.

   The planned program that doesn't include the people affected may be destined for failure.

The following write up explains in brief the major elements of Extension program development. After reading you will no doubt want to discuss these elements and the questions at the end with your supervisor and fellow staff members.

# EXTENSION PROGRAM PLANNING PROCESS*

Program planning is viewed as a process through which representatives of the people are intensively involved with Extension personnel and other professional people in six activities:

-Studying facts and trends. i.e. Situation

-Identifying problems and opportunities based on these facts and trends.

-Making decisions about problems and opportunities that should be given priority.

-Establishing objectives or recommendations for future economic and social development of a community through educational programs.

-Determining and carrying out appropriate educational methods and evaluating progress toward objectives and accomplishment of goals.

A. SITUATION: It is very significant that existing situations be adequately studied. Factual data must be collected and correctly analyzed in order to identify problems that should be the basis for programs. Background information should include beliefs, attitudes, understandings, and knowledge about the economic and social situation. Situation information provides a benchmark or starting point for measuring change. People for whom programs are planned should be involved in the collection of facts, especially of a local nature.

Evaluation is applied to facts obtained for situation analysis. The facts are evaluated in line with established criteria. Some criteria are: facts must be accurate, adequate, current, and relevant. Facts should be analyzed and interpreted to be meaningful. The analysis of the situation information should justify the time that will be spent on the program in relation to other problems that may be identified and programs initiated.

B. PROBLEMS AND/OR OPPORTUNITY IDENTIFICATION: Problems and/or opportunities should be clearly defined and should be related to the situation as analyzed. Problems and/or opportunities selected for emphasis in an Extension program should be:

1. Significant in terms of the number of people concerned
2. Important in educational content
3. In line with Extension's educational responsibility.

The problem should also be possible of solution.

C. OBJECTIVES: Objectives should be determined in line with problems. Objectives should be determined cooperatively by the people for whom programs are intended and Extension workers. Objectives should specify the kinds of behavior changes desired, the subject matter area in which changes are to be made, and who is to make the changes. Objectives should also be challenging, achievable, and

D. METHODS: The purpose of the planning process is to determine information needs and to organize learning experiences (methods and techniques) that will give people the information they need. Appropriate methods and techniques in line with objectives are needed. It is easy to lose sight of objectives and use the various methods and techniques as an end rather than as a means of reaching a desired result or objective. We should continually ask ourselves "What is the purpose of this meeting, demonstration, news release, judging event, etc." The proper selection of the method is important.

E. EVALUATION: The total program effort must ultimately be measured in terms of goals and objectives attained. Evaluation is measuring accomplishments or the desired change. Benchmarks must be used in measuring progress. Background or situational information would indicate where we are in any area of concern. Progress is measured by surveying the advance toward the achievement of our goals.

The following questions should be answered by you and your supervisor in determining priorities for the programs you are to be involved in.

1. Is this a legitimate job for Extension and why?

2. Who wants the problem solved and why?

3. What is the size (width and depth) of the problem?

4. What degree of importance has the problem now and foreseen?

5. What are the chances of success?

7. Who will benefit, and be harmed, by solving the problem?

8. What are the resources available? Will they do the job in total or in part?

9. Is additional outside help available? List.

10. Is our clientele capable of solving the problem without our help? Expalin the reason for this answer.

*Prepared by Charles E. Nelson, District Extension Director
Colorado State University Cooperative Extension Service
November 1972.

THE ORIENTATION PROCESS

Phase VII - Objective: to become aware of the need for professional competence and continuous professional improvement opportunities.

You, as with all Extension staff, are expected to exhibit professional competence and take advantage of opportunities for professional improvement. In reality, the reason for this Phase is to begin your continuous process within the Extension Service toward increasing competence through professional improvement. It is the responsibility of your supervisor to make information available that will result in continuous development of all staff members. It is your responsibility to take advantage of the opportunities provided to you.

Suggested Activities

1. Read Sanders' Instruction in the Cooperative Extension Service 1972.

2. Selectively read articles of interest provided in the Journal of Extension.

3. Others (selectively chosen by the supervisor and you as appropriate).

4. In consultation with your supervisor begin preparing a professional improvement plan. "Where I plan to go in Extension and how do I get there."

Suggestions

Using the check list provided in this section, and based on consultations with your supervisor, begin identifying your additional professional improvement and training needs. These identified needs may then be used to construct a professional improvement plan that will go beyond orientation training. Some of this additional training may be identified as reading while other training may be more complex and require workshops, summer schools or training leading toward advanced degrees. For more information on professional improvement and training information or opportunities, you and/or your supervisor may contact and consult with the Extension Service Staff Development Coordinator.

PROFESSIONAL IMPROVEMENT CHECKLIST

The following is a check list which may be useful for you in identifying further professional improvement needs and interests. Be sure to discuss your needs and plans with your supervisor for he is responsible for justifying the training and professional improvement activities his staff participates in.

_____A. Training needs in:

_____1. Specific subject matter (identify)

_____

_____

_____

_____2. Specific Extension program philosophies

_____ 4-H and Youth

_____ Community and resource development

_____ Agricultural programs (specify)

_____ Family living and nutrition programs (specify)

_____ Other (specify)

_____3. Communications

_____4. Group processes (social action and problem solving)

_____5. Supervisory training (staff and office management)

_____6. Other (list)

_____B. The new staff member has a prepared professional improvement plan developed with the aid of the supervisor and appropriate resource people based on training needs identified above.

## SOME RECOMMENDED READINGS

## FOR SUPERVISORS AND NEW EMPLOYEES

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